



Guide to the Process for TMA Accreditation

Self-Study Report Performance-in-Practice Interview

Table of Contents

Overview

Data Sources Used in the Accreditation Process	2
Expectation for Materials.....	2
Missing or Incomplete Information.....	2
Decision-Making.....	2

Step 1: Self-Study Report – Data Source #1

Conducting Your Self-Study.....	3
Completing Your Self-Study Report	3
Submitting Your Self-Study Report.....	3

Step 2: Evidence of Performance-in-Practice – Data Source #2

Entering CME Activity Data in PARS	3
Selection of Activities for Performance-in-Practice.....	3
Preparing and Submission of Evidence of Performance-in-Practice	4

Step 3: Interview – Data Source #3

Interview Format	4
Scheduling Interview	4
Sample Agendas for Interview	4
Interview Fees	5

CME Accreditation Timeline and Checklist	6
---	----------

Continuing Medical Education Department
Texas Medical Association
800-880-1300, ext. 1446

Overview

Data Sources Used in the Accreditation Process

The accreditation process is an opportunity for an organization to demonstrate that its practice of CME is in compliance with the Texas Medical Association (TMA) accreditation requirements and policies through three primary sources of data about the organization's CME program:

1. **Self-Study Report:** Organizations are asked to provide descriptions and attachments to give TMA an understanding of its CME practices.
2. **Evidence of Performance-in-Practice Review:** Organizations are expected to verify that their CME activities are in compliance through the documentation review process.
3. **Accreditation Interview:** Organizations are presented with an opportunity to further describe and provide clarification, as needed, on aspects of practice described and verified in the Self-Study Report or performance-in-practice review; to ensure that any questions regarding the provider's procedures or practices are answered and that complete information about the provider's organization is considered in the accreditation decision.

Forms and documents used to facilitate the accreditation process are emailed to the accredited provider or to the organization applying for accreditation, and available online. To access the forms and documents, go to the TMA website at www.texmed.org. Go to **CME** on the navigation bar, select **For CME Providers**, and then select **Find Accreditation Resources**.

Organizations up for reaccreditation or applying for initial accreditation will be invited to participate in the Preparing for Accreditation webinar offered by TMA.

Expectations for Materials

Information and materials submitted to TMA must not contain any untrue statements, must not omit any necessary material facts, must not be misleading, must fairly present the organization, and are the property of the organization.

Information and materials submitted for accreditation (Self-Study Report, evidence of performance-in-practice, other materials) must not include individually identifiable health information, in accordance with the Health Insurance Portability and Accountability Act (HIPAA).

Missing or Incomplete Information

Providers that meet the deadlines and submission requirements of the accreditation review process will receive an accreditation decision from TMA. Please note, if TMA is unable to render a decision due to missing or incomplete information, TMA reserves the right to request additional information, the expenses for which will be borne by the provider.

Decision-Making

Your organization's compliance findings and the outcome of the accreditation review are determined by TMA and based on the data and information collected in the accreditation process. The data and information are analyzed and synthesized by TMA surveyors and a report and recommendation is provided to the Subcommittee on Accreditation. The subcommittee reviews and makes a recommendation to the Committee on Continuing Education. The committee makes the final accreditation decision. The multi-tiered system of review provides checks and balances to ensure fair and accurate decisions. This is further enhanced by the TMA's use of a criterion-referenced decision-making system. The subcommittee and committee meet three times each year (generally, in January, June, and September).

Step 1: Self-Study Report – Data Source #1

Conducting Your Self-Study

The Self-Study Report process provides an opportunity for the accredited provider or an organization applying for initial accreditation to reflect on its program of CME. This process can help the organization assess its commitment to and role in providing continuing medical education and determine its future direction. The process of conducting a self-study is unique to an organization. Depending on the size and scope of the organization's CME program, the process may involve many or just a few individuals.

Completing Your Self-Study Report

For **reaccreditation**, TMA will send the Self-Study Report forms in the Notice of Reaccreditation email approximately 12 months prior to your organization's new accreditation decision/accreditation expiration. The email includes the due date for submitting the Self-Study Report.

For **initial accreditation**, if your organization is approved to complete the Self-Study Report, TMA will email the Self-Study Report form within six weeks of the submission of the Pre-Application and fee.

Submitting Your Self-Study Report

Email the completed Self-Study Report form(s) in a Word document to the TMA director of physician education services: casey.harrison@texmed.org.

Step 2: Evidence of Performance-in-Practice – Data Source #2

You will verify that your CME activities are in compliance with TMA's Accreditation Criteria and Policies through the performance-in-practice review process. TMA will select up to 15 activities from your current accreditation term for which you will present evidence to demonstrate that your CME activities are in compliance with TMA's Accreditation Criteria and Policies.

Entering CME Activity Data in PARS

For **reaccreditation**, enter or update known information about the activities that your organization has provided, or will provide, through your current accreditation term expiration, under the umbrella of your TMA accreditation statement.

For **initial accreditation**, do not enter activity information in PARS – TMA will coordinate activity review directly with the initial applicant.

Selection of Activities for Performance-in-Practice

Based on the CME activity data you provide to PARS, TMA will select up to 15 activities for review for **reaccreditation**. The list of activities selected, and TMA's Performance-in-Practice Structured Abstract will be emailed to the organization's primary contact approximately **four weeks** prior to an on-site interview, or **eight weeks** prior to a virtual interview.

Providers are accountable for demonstrating performance-in-practice for all activities selected. It is important that you carefully review the list of activities selected by TMA. If you note an error, such as an incorrect activity date or format, or if an activity was cancelled or otherwise did not occur, please notify TMA by email at casey.harrison@texmed.org to make corrections or adjustments to the sample of activities selected.

For **initial accreditation**, at a minimum, the required two activities completed within the 24-month period prior to the interview will be or reviewed.

Preparing and Submission of Evidence of Performance-in-Practice

Using the TMA Performance-in-Practice Structured Abstract form, you will submit evidence of performance-in-practice for each activity selected by TMA.

For an **on-site interview**, have one hard copy available at the interview of the completed Performance-in-Practice Structured Abstract with required attachments for each activity.

For a **virtual interview**, organizations are expected to **email** the completed Performance-in-Practice Structured Abstracts with attachments for each activity **four weeks** before the date of the virtual interview to casey.harrison@texmed.org. If you choose to scan the evidence into one pdf file, please bookmark each Attachment in the activity file.

Step 3: Interview – Data Source #3

A surveyor(s) from the Subcommittee on Accreditation and a TMA staff member of physician education services will review the Self-Study Report and completed Performance-in-Practice Structured Abstracts. Following the review, the survey team will visit with representatives of your CME program to engage in a dialogue about your organization's policies and practices that ensure compliance with the TMA accreditation criteria and polices. The survey team may request that a provider submit additional materials based on this dialogue to verify a provider's practice.

TMA surveyors will not provide feedback regarding compliance or the expected outcome of the accreditation review. Your organization's compliance, your findings, and the outcome of the accreditation process are determined by the Committee on Continuing Education upon receiving a recommendation from the Subcommittee on Accreditation.

Interview Formats

For **reaccreditation**, TMA utilizes an on-site or virtual format for the accreditation interview and performance-in-practice review. To be considered for a virtual format by the Subcommittee on Accreditation and the Committee on Continuing Education, the TMA-accredited organization must not have probationary status in their current accreditation cycle. Information regarding the format(s) available to your organization will be sent with the Notice of Reaccreditation email.

For **initial accreditation**, an on-site format is used for the interview and performance-in-practice review.

The Subcommittee on Accreditation and Committee on Continuing Education will consider a virtual format if circumstances result in a failure to negotiate an on-site interview date, or the location is difficult for surveyors to access.

Scheduling Interview

For **reaccreditation**, information regarding the process of scheduling the interview is included in the Notice of Reaccreditation email. For **initial accreditation**, when it is determined that the Self-Study Report exhibits evidence that the program is likely to meet the accreditation requirements and policies, an on-site interview will be scheduled with the organization. TMA will confirm your assigned surveyor(s) and interview date and time in an email.

Sample Agendas for an Interview

On-site: The interview is held at the provider's site; and involves a meeting between the representatives of the accredited provider and TMA survey team. The interview is usually scheduled from **9 am-1:30 pm**; following is a typical survey agenda:

9-10:30 am (surveyors only)	Performance-in-Practice review of selected activity files
10:30 am-Noon	Interview with accredited provider's CME Committee Chair, staff, and

administrator(s) – overview of survey purpose and role of surveyors, discussion of CME program, and discussion of TMA accreditation requirements and policies

Noon-1pm

Lunch with staff, administrators, and CME Committee

1-1:30 (surveyors only)

Discuss report and recommendation

Virtual: The interview is held through Zoom; and includes representatives of the accredited provider and TMA survey team. The interview takes approximately **90 minutes** (scheduled times vary because there is a more flexibility with a virtual interview); following is a typical survey agenda:

Prior to interview (surveyors only) Performance-in-Practice review of selected activity files

1–2 hours

Interview with accredited provider’s CME Committee Chair, staff, and administrator(s) – overview of survey purpose and role of surveyors, discussion of CME program, and discussion of TMA accreditation requirements and policies

After interview (surveyors only) Discuss report and recommendation

Interview Fees

In addition to the **reaccreditation fee** of \$3000 or **initial accreditation fee** of \$2000, providers incur expenses related to the interview.

Reaccreditation and Initial Accreditation – On-site interview expenses include the chair surveyor’s honorarium of \$500; and survey team travel, meals, and incidental expenses (incurred in accordance with TMA’s policies regarding reimbursable expenses for volunteers).

Reaccreditation – Virtual interview expenses include the chair surveyor’s honorarium of \$250.

TMA will invoice the provider for the survey team travel expenses or conference call fee within 30 days of the interview.

Overview of CME Reccreditation Timeline (estimated) & Checklist

Before New Accreditation Decision/Expiration Date	Before Interview Date	After Interview Date
<ul style="list-style-type: none"> <input type="checkbox"/> Receive Notice of Reccreditation email from TMA – email includes Notice of Reccreditation letter, Guide to the Process for TMA Accreditation, Self-Study Report forms and CME Interview Preferences form (12 months before accreditation decision/expiration date) <input type="checkbox"/> Participate in Preparing for Accreditation webinar (7 months before accreditation decision/expiration date) <input type="checkbox"/> Submit known activity information in PARS (at least 4 months before accreditation decision/expiration date) <input type="checkbox"/> Email completed Self-Study Report and CME Interview Preferences forms to TMA (4 months before accreditation decision/expiration date) <input type="checkbox"/> Receive invoice in mail from TMA for accreditation fee (4 months before accreditation decision/expiration date) <input type="checkbox"/> Receive an email from TMA to schedule interview (3-4 months before accreditation decision/expiration date) 	<ul style="list-style-type: none"> <input type="checkbox"/> Receive an email from TMA confirming the interview (at least 1 month before the interview date) <input type="checkbox"/> Receive an email from TMA with the list of activities selected for review and TMA’s Performance-in-Practice Structured Abstract (virtual – at least 8 weeks before the interview date, on-site – at least 4 weeks before the interview date) <input type="checkbox"/> Review list of activity files and notify TMA if there are any errors (virtual – at least 8 weeks before the interview date, on-site – at least 4 weeks before the interview date) <input type="checkbox"/> Complete Performance-in-Practice Structured Abstract for each activity selected for review (virtual – 4 weeks before the interview date, on-site – by the day of the interview) <input type="checkbox"/> Virtual interview only: email completed Performance-in-Practice Structured Abstracts to TMA (4 weeks before the interview date) <input type="checkbox"/> Prepare extra copies of the Self-Study Report and Performance-in-Practice Structured Abstracts for your staff participating in the accreditation interview (by the day of the interview) 	<ul style="list-style-type: none"> <input type="checkbox"/> Submit additional materials (if requested by TMA) <input type="checkbox"/> Receive an email from TMA regarding the accreditation decision (shortly after the Subcommittee on Accreditation and Committee on Accreditation meet) <input type="checkbox"/> Receive Accreditation Decision letter and Accreditation certificate by mail (within four weeks of TMA’s Subcommittee on Accreditation and Committee on Accreditation meeting) <input type="checkbox"/> Receive invoice in mail from TMA for interview fees (within four weeks of TMA’s Subcommittee on Accreditation and Committee on Accreditation meeting or earlier)